

Candidates for Elective State Office (Including Officeholders)

State Special Election May 19, 2009 Calendar

Ongoing Reports:

- **\$5,000 Report (contributions received).** Electronic filers¹ must file Form 497 within 10 business days if a contribution of \$5,000 or more is received from a single source at any time other than the 90-day election cycle² including after the election. No paper copy is required and no copies are required to be filed with other filing officers.
- **State Ballot Measure Report.** Electronic filers¹ must file Form 497 within 10 business days if contributions totaling \$5,000 or more are made to support or oppose a state ballot measure. This report is also required after the election.
- **Paid Spokesperson Report.** File Form 511 within 10 days if an expenditure of \$5,000 or more is made to an individual to appear in an advertisement to support or oppose a ballot measure.

February 18 through May 19, 2009. Electronic filers¹ must file Form 496 within 24 hours if independent expenditures of \$1,000 or more are made to support or oppose a state ballot measure listed on this election's ballot.

April 30, 2009 – Odd-Year Report. File Form 460 if contributions totaling \$10,000 or more are made to elected state officeholders, their controlled committees, (including controlled ballot measure committees) or committees primarily formed to support or oppose elected state officeholders during the period January 1 through March 31. This report is not required if the contributions were made to state ballot measure committees not controlled by a state officeholder.

May 3, 2009 through May 18, 2009 – Late Contribution/Late Independent Expenditure Reports.

Electronic filers¹: File Form 497 within 24 hours if, during the period, contributions totaling \$1,000 or more are made to a committee primarily formed to support or oppose a ballot measure being voted on in the May 19 election during the corresponding period. Paper copies are required and copies are required to be filed with filing officials in Los Angeles and San Francisco.

¹ Committees must file electronically with the Secretary of State if, since January 1, 2000, they received contributions or made expenditures totaling \$50,000 or more. For more information, visit the Secretary of State's website (www.sos.ca.gov). Paper copies may also be required.

² "Election cycle" is defined as 90 days prior to an election and ending on the date of the election.

Non-Electronic filers: File Forms 496/497 within 24 hours if during the period, contributions totaling \$1,000 or more are made to a committee primarily formed to support or oppose a ballot measure or if independent expenditures totaling \$1,000 or more are made to support or oppose a ballot measure being voted on in the election during the corresponding period. File the original with the Secretary of State and paper copies must also be sent to the state campaign filing officials in Los Angeles and San Francisco. A Form 497 is also required if a contribution of \$1,000 or more is made to a political party.

July 31, 2009 – Semi-Annual Statement. File Form 460 for the period January 1 (or April 1 or May 3) through June 30.

The following reports may be required, depending on a committee's activity in connection with an election:

Supplemental Independent Expenditure Reports. File Form 465 if independent expenditures totaling \$1,000 or more are made in a calendar year to support or oppose a measure being voted on in an election. The form is filed at the same time, covering the same periods, and in the places where the committee being supported or opposed is required to file. Depending upon when the \$1,000 independent expenditure is made, a report may be due April 9, May 7, or July 31, 2009.

Supplemental Pre-Election Reports. File Form 495 if contributions totaling \$10,000 or more are made in connection with an election. The form is due by May 7, the deadline for the second pre-election statement for the election and is filed as an attachment to the Form 460. [Note: This report is not required if all contributions are reported on an odd-year report filed on or before the deadline for this report.]